COCCOCCOCC 348

Employee Post-Travel Disclosure of Travel Expenses

SECRETARY OF THE SENATE

Post-Travel Filing Ins	structions: Complete	this form within 30 day		UNLIART OF THE SENAIL
travel. Submit all form	s to the Office of Pub	lic Records in 232 Har	t Building.	7 SEP 20 PM 2: 57
In compliance with Ru be reimbursed/paid for	le 35.2(a) and (c), I m me. I also certify that	ake the following disclo	sures with respect to	travel expenses that have been or wi
☑ The <u>original</u> Emplo ☑ A <u>copy</u> of the <i>Priva</i>	yee Pre-Travel Autho te Sponsor Travel Cer	rization (Form RE-1), <u>A</u> rtification Form with all	ND attachments (itinerary	y, invitee list, etc.)
Private Sponsor(s) (list	all): The Pew Cha	ritable Trusts		
		September 17th, 20)17	<u> </u>
Name of accompanying Relationship to Travele	er: 🗆 Spouse 🗆	Child	101 (D. 101 (D	DE OD DEDENIDENIT CHILD ONLY
IF THE COST OF LODG INCLUDE LODGING C Expenses for Employe	OSTS IN EMPLOYEE	EASE DUE TO THE ACC EXPENSES. (Attach addit	ional pages if necessary	SE OR DEPENDENT CHILD, ONLY
Expenses for Employ	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate	\$23.53	\$286	\$128	
🗷 Actual Amount				
Expenses for Accomp	anying Spouse or De	ependent Child (if applie	able):	
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate				
☐ Actual Amount				
Provide a description necessary.): See att		vents attended. See Sena	te Rule 35.2(c)(6). (A	Attach additional pages if
			<u> </u>	
9/20/17	Joe Hac			
(Date)	(Printed	name of traveler)		(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the Employee Pre-Travel Authorization form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

9/20/17
(Date)

Set Tiples

©©©©©©©©©©©©©©

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Date/Time Stamp:

SECRETARY OF THE SENATE

17 SEP 19 PM 4: 24

Pre-Travel Filing Instructions: Complete and subm	it this form at least 30 days
prior to the travel departure date to the Select Comm	ittee on Ethics in SH-220.
Incomplete and late travel submissions will not be co	nsidered or approved. This
form must be typed and is available as a fillable PDF	on the Committee's website
at ethics.senate.gov. Retain a copy of your entire pre	-travel submission for your
required post-travel disclosure.	
Name of Traveler	Joe Hack

NAME OF TRAVEICE.	
Employing Office/Committee:	Office of U.S. Senator Deb Fischer
Private Sponsor(s) (list all): The Pew C	Charitable Trusts
Travel date(s): September 15th throu	
Note: If you plan to extend the tr	ip for any reason you <u>must</u> notify the Committee.
Destination(s): Richmond, VA	· · · · · · · · · · · · · · · · · · ·
Explain how this trip is specifically conn	ected to the traveler's official or representational duties:
The Senate Chiefs of Staff Mana necessary skills and a broader untheir Senators	agement and Leadership Retreat will assist chiefs in gaining understanding of their daily roles and duties in order to better serve
Name of accompanying family member (Relationship to Employee: Spouse	
I certify that the information contained in	n this form is true, complete and correct to the best of my knowledge:
(Date)	(Signature of Employee)
TO BE COMPLETED BY SUPERVISING Secretary for the Majority, Secretary for the	SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Minority, and Chaplain):
, Senator Deb Fischer	Joe-Hack
(Print Senator's/Officer's Name)	hereby authorize
related expenses for travel to the event de	n, to accept payment or reimbursement for necessary transportation, lodging, and escribed above. I have determined that this travel is in connection with his or her holder, and will not create the appearance that he or she is using public office for
I have also determined that the attendance	e of the employee's spouse or child is appropriate to assist in the representation
of the Senate. (signify "yes" by checking bo	x) 🗍
24 July 2017	Set Tille
(Date)	(Signature of Supervising Senator/Officer)
(Revised 10/19/15)	Form RE

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

Spo	onsor(s) of the trip (please list all sponsors): The Pew Charitable Trusts
De	scription of the trip:
— Da	tes of travel: September 15-17, 2017
	ce of travel:
	me and title of Senate invitees: Chiefs of Staff
l ce	(A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
X	(B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
X	I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
X	I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
	The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for de minimis lobbyist involvement. - AND -
X	

9.	USE ONLY IF YOU CHECKED QUESTION 6(B) I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:
	(A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip.
	(B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10).
	(C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
10.	USE ONLY IF YOU CHECKED QUESTION 9(B) If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:
11.	An itinerary for the trip is attached to this form. I certify that the attached itinerary is a detailed (hourby-hour), complete, and final itinerary for the trip.
12.	Briefly describe the role of each sponsor in organizing and conducting the trip:
	The Pew Charitable Trusts is the sole organizer and sponsor of this trip.
13.	Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission: See attachment.
14.	Briefly describe each sponsor's prior history of sponsoring congressional trips:
	C
	See attachment.
	See attachment.

			<u>-</u>	<u> </u>
Total Expenses for Ea	ach Participant:			
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expense
	\$73.57/roundtrip	\$286	\$128	
Good Faith estimate	\$44.51/local transportation			
Actual Amounts				
congressional particip	pauon.			vith regard to
- '	ranged specifically with r	egard to congressio	nal participation.	
This trip has been an		· · · · · · · · · · · · · · · · · · ·	nal participation.	
This trip has been an	ranged specifically with r	or trip		
This trip has been an Reason for selecting Richmond was selected	the location of the event	or trip imity to Washington		
This trip has been an Reason for selecting Richmond was selection of the Name and location of th	the location of the event	or trip imity to Washington	DC and its historical	
This trip has been an Reason for selecting Richmond was selection of the Name and location of th	the location of the event	or trip imity to Washington	DC and its historical	
Reason for selecting Richmond was selected Name and location of the Jefferson Hotel, Reason(s) for selection	the location of the event	or trip imity to Washington acility: Richmond, VA 232	DC and its historical	significance.

	scribe how the daily expenses for lodging, meals, and other expenses provided to trip participants appares to the maximum per diem rates for official Federal Government travel:
Lo	dging and meals are at the per diem rate for Richmond, VA.
	· · · · · · · · · · · · · · · · · · ·
clas	scribe the type and class of transportation being provided. Indicate whether coach, business-class or first ss transportation will be provided. If first-class fare is being provided, please explain why first-class yel is necessary:
Tra	ansportation to Richmond will be provided via Amtrak using the lowest coach fare. Transportation back
to '	Washington, DC, will be via coach bus.
X	I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).
	t any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why entertainment is an integral part of the event:
N//	<u> </u>
I he	ereby certify that the information contained herein is true, complete and correct. (You must include the inpleted signature block below for each travel sponsor.): nature of Travel Sponsor:
Na	me and Title: David Gilliand, Officer
	me of Organization: The Pew Charitable Trusts
	dress: 901 E Street, NW, 10th Floor, Washington, DC, 20004
	ephone Number: (202) 552-2145
	Number: (202) 552-2299
	nail Address: dgilliland@pewtrusts.org

Addendum to Private Sponsor Travel Certification Form, The Pew Charitable Trusts Management and Leadership Retreat, September 15-17, 2017

- 1-10. See form
- 11. See attachment.
- 12. See form.
- 13. Through both its information and advocacy work, The Pew Charitable Trusts seeks to inform and advance the development of sound public policy in the United States, as well as to strengthen the institutions that form the foundations of our democracy. A major component of this ongoing strategy has been to help create an environment in which policy makers can productively deliberate important issues of the day. The purpose of the retreat is to provide a collaborative environment for the chiefs of staff to learn from experts and discuss issues of importance to an effective legislative process.
- 14. The Pew Charitable Trusts has directly sponsored congressional travel. This will be the sixth Senate chiefs of staff retreat hosted by Pew (2007, 2009, 2011, 2014, 2015). In the past, the Pew Charitable Trusts has also funded other institutions via grants to conduct their educational programs and some of these programs may have included congressional travel.
- 15. The Pew Charitable Trusts is driven by the power of knowledge to solve today's most challenging problems. Pew applies a rigorous, analytical approach to improve public policy, inform the public and invigorate civic life. We partner with a diverse range of donors, public and private organizations and concerned citizens who share our commitment to fact-based solutions and goal-driven investments to improve society. Pew issues dozens of research reports each year to educate the public and policy makers. Pew also sponsors convenings of researchers and experts to examine various issues of public policy and civic life.
- 16. See form.
- 17. See form.
- 18. See form.
- 19. See form.
- 20. See form.
- 21. See form.
- 22. See form.
- 23. See form.
- 24. See form.
- 25. See form.





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Senate Chiefs of Staff Retreat Draft Itinerary Richmond, Virginia / September 15-17, 2017

Friday, September 15, 2017

2:30pm Depart Union Station via Amtrak 95 (coach fare)

5:15pm Arrive 30th Main Street Station, Richmond

5:30pm Travel via bus to Jefferson Hotel, 101 W. Franklin Street

5:40pm Arrive Jefferson Hotel, check in (GSA per diem rate)

7:30-9:30pm Reception

Saturday, September 16, 2017

8:30-9:30am Breakfast at your leisure, Jefferson Hotel

9:30-11:30am Breakthrough Communication: Navigating High-Stakes

Conversations, Peter and Susan Glaser

Communication skills are the first step in developing strong relationships, making quality decisions, and creating high

performance teams. But, most importantly, communication can serve as a tool to constructively manage conflict. This training is rooted in the Glasers' 39 years of field-tested and published research on interpersonal communication and leadership development.

Participants learn seven communication models to understand and transform high-stakes conversations into a powerful and effective

stimulus for change.

11:30am-12:00pm Break

12:00-1:15pm Lunch with special guest "Patrick Henry"

1:15-2:30pm State of the News Media, Amy Mitchell, Pew Research Center

Eight years after the Great Recession sent the U.S. newspaper industry into a tailspin, the pressures facing America's newsrooms have intensified to nothing less than a reorganization of the industry

itself, one that impacts the experiences of even those news

consumers unaware of the tectonic shifts taking place. Amy Mitchell will brief chiefs on the annual "State of the News Media" report and

its implications on public policy.

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2:45-3:30pm How Technology, Robotics and Automation May Affect the U.S.

Economy in the Future, David Pogue, Yahoo Technology

David Pogue is the tech critic for Yahoo Finance, and was previously the personal-technology columnist for the New York Times for 13 years. He's also a monthly columnist for Scientific American and host of science shows on PBS's "NOVA," and a correspondent for "CBS"

Sunday Morning" since 2002.

6:00pm Buses depart for Governor's Mansion

6:15pm Arrive Governor's Mansion, Capitol Square

6:30-8:00pm Reception and dinner- Keynote remarks by Gov. Terry McAuliffe

8:00pm Buses Depart for Jefferson Hotel

Sunday, September 17, 2017

8:00-9:00am Breakfast at your leisure, Jefferson Hotel - Bag Call

9:00-10:00am It's the Economy - Bill McInturff, Public Opinion Strategies, and Geoff Garin, Hart

Reseach

Pollsters McInturff and Garin will explore Americans' attitudes and views regarding jobs, the economy and the current state of the "American Dream" to

better inform chiefs of staff as they tackle legislation in these areas.

10:15-12:00pm Presidential Recordings – The Executive/Legislative Branch Relationship

Through History, the Miller Center at UVA

To assist chiefs in gaining a better understanding of effective working

relationships between the legislative and executive branches, this session will explore the interactions between the president and Senate leadership over the years through the Miller Center's exhaustive collection of Oval Office recordings

from Kennedy through Nixon.

12:00pm Pick up box lunches

12:15pm Buses depart Jefferson Hotel for Washington

3:00pm (approx.) Arrive U.S. Capitol



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Friday, September 15, 2017

2:30pm Depart Union Station via Amtrak 95 (coach fare)

5:15pm Arrive Main Street Station, Richmond

5:30pm Travel via bus to Jefferson Hotel, 101 W. Franklin Street

5:40pm Arrive Jefferson Hotel, check in (GSA per diem rate)

7:30-9:30pm Dinner with keynote speaker Historian Alexander Rose, author of

Washington's Spies: The Story of America's First Spy Ring (now the TV show "Turn: Washington's Spies). Review agenda and

goals of conference. (Empire Room)

Saturday, September 16, 2017

8:30-9:30am Breakfast at your leisure, Jefferson Hotel (Rotunda)

9:30-11:30am Breakthrough Communication: Navigating High-Stakes

Conversations, Peter and Susan Glaser

Communication skills are the first step in developing strong relationships, making quality decisions, and creating high performance teams. But, most importantly, communication can serve as a tool to constructively manage conflict. This training is rooted in the Glasers' 39 years of field-tested and published research on interpersonal communication and leadership development. Participants learn communication models to

understand and transform high-stakes conversations into a powerful

and effective stimulus for change. (Grand Ballroom)

11:30am-12:00pm Break

12:00-1:15pm Lunch with speaker Larry Sabato, the University of Virginia.

(Ginter Gallery)

1:15-2:30pm State of the News Media, Amy Mitchell, Pew Research Center

Eight years after the Great Recession sent the U.S. newspaper industry into a tailspin, the pressures facing America's newsrooms have intensified to nothing less than a reorganization of the industry

itself, one that impacts the experiences of even those news consumers unaware of the tectonic shifts taking place. Amy Mitchell will brief chiefs on the annual "State of the News Media" report and its implications on public policy. (Grand Ballroom)

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2:30-2:45pm Break

2:45-3:45pm How Technology, Robotics and Automation May Affect the

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David Pogue is the tech critic for Yahoo Finance, and was previously the personal-technology columnist for the New York Times for 13 years. He's also a monthly columnist for Scientific American and host of science shows on PBS's "NOVA," and a correspondent for "CBS Sunday Morning" since 2002. (Grand

Ballroom)

6:00pm Buses depart for Governor's Mansion

6:15pm Arrive Governor's Mansion, Capitol Square

6:30-8:00pm Reception - Remarks by Gov. Terry McAuliffe

8:00pm Buses Depart for Jefferson Hotel

Sunday, September 17, 2017

8:00-9:00am Breakfast at your leisure, Jefferson Hotel - Bag Call (Empire Room)

9:05-9:15am Greeting from Senator Tim Kaine (Grand Ballroom)

9:15-10:15am It's the Economy - Bill McInturff, Public Opinion Strategies, and Geoff

Garin, Hart Research

Pollsters McInturff and Garin will explore Americans' attitudes and views regarding jobs, the economy and the current state of the "American Dream" to better inform chiefs of staff as they tackle legislation in these areas. (Grand

Ballroom)

10:15-12:00pm Presidential Recordings – The Executive/Legislative Branch Relationship

Through History, Marc Selverstone, the Miller Center at UVA

To assist chiefs in gaining a better understanding of effective working relationships between the legislative and executive branches, this session will explore the interactions between the president and Senate leadership over the

years through the Miller Center's exhaustive collection of Oval Office

recordings from Kennedy through Nixon. (Grand Ballroom)

12:00pm Pick up box lunches

12:15pm Buses depart Jefferson Hotel for Washington

3:00pm (approx.) Arrive Union Station parking garage

List of invited staff for

Management and Leadership Retreat

Richmond, VA

September 15-17, 2017

Sponsored by The Pew Charitable Trusts

Senator	State	First	Last
Alexander	TN	David	Cleary
Baldwin	WI	Bill	Murat
	wy		
Barrasso	 	Dan	Kunsman
Bennet	CO	Jonathan	Davidson
Blumenthal	CT	Laurie	Rubiner
Blunt	MO	Stacy	McBride
Booker	NJ	Matt	Klapper
Boozman	AR	Helen	Tolar
Brown	ОН	Sarah	Benzing
Burr	NC	Dean	Myers
Cantwell	WA	Travis	Lumpkin
Capito	WV	Joel	Brubraker
Cardin	MD	Chris	Lynch
Carper	DE	Bill	Ghent
Casey	PA	Kristen	Gentile
Cassidy	LA	James	Quinn
Cochran	MS	Brad	White -
Collins	ME	Steve	Abbott
Coons	DE	Adam	Bramwell
Corker	TN	Todd	Womack
Cormyn	ΤX	Beth	Jafari
Cornyn	אַז	Monica	Рорр
Cortez Masto	NV	Scott	Fairchild
Cotton	AR	Doug	Coutts
Crapo	ID.	Susan	Wheeler
Cruz	TX	David	Polyansky
Daines	MT	Jason	Thielman
Donnelly	IN	Joel	Elliott
Duckworth	(L	Kaltlin	Fahey
Durbin	IL.	Patrick	Souders
Enzi	WY	Tara	Shaw
Ernst	IA	Lisa	Goeas
Feinstein	CA	Steve	Haro
Fischer	NE	Joe	Hack .
Flake	AZ	Chandler	Morse
Franken	MN	Jeff	Lomonaco

Gardner	်ထ	Natalie	Rogers
Gillibrand	NY	Jess	Fassler
Graham	sc	Richard	Perry
Grassley	IA	JIII	Kozeny
Harris	CA	Nathan	Barankin
Hassan	NH	Marc	Goldberg
Hatch	UT	Matt	Sandgren
Heinrich	NM	Joe	Britton
Heltkamp	ND	Tessa	Gould
Heller	NV	Mac	Abrams
Hirono	Hi	Betsy	Un
Hoeven	ND	Ryan	Bernstein
Inhofe	OK	Luke	Holland
Isakson	GA	Joan	Kirchner Carr
Johnson	WI	Топу	Blando
Kaine	VA	Mike	Henry
Kennedy	LA	Preston	Robinson
King	ME	Kay	Rand
Klobuchar	MN	Elizabeth	Peluso
Lankford	OK	Greg	Slavonic
Leahy	VT	JP	Dowd
Lee	IJ	Allyson	Bell
Manchin	w	Pat	Hayes
Markey	MA	Paul	Tencher
McCain	AZ	Pablo	Carrillo
McCaskill	MO	Julie	Dwyer
McConnell	KY	Phil	Maxson
McConnell	KY	Sharon	Soderstrom
Menendez	NJ	Fred	Turner
Merkley	OR	Michael	Zamore
Moran	KS	Brennen	Britton
Murkowski	AK	Mike	Pawlowski
Murphy	CT	Allison	Herwitt
Murray	WA	Mike	Spahn
Neison	FL	Susie	Perez Quinn
Paul	KY	William	Henderson
Perdue	GA	Derrick	Dickey
Peters	MI	Eric	Feldman
Portman	ОН	Mark	Isakowitz
Reed	RI	Neil	Campbell
Risch	ID	John	Sandy
Roberts	KS	Jackie	Cottrell
Rounds	SD	Rob	Skjonsberg

Rubio	FL	Clint	Reed
Sanders	VT ·	Michaeleen	Crowell
Sasse	NE	Raymond	Sass
Schatz	HI	Andrew	Winer
Schumer	NY	Mike	Lynch
Schumer	NY	Erin	Vaughn
Scott	SC	Jennifer	DeCasper
Shaheen	NH	Maura	Keefe
Shelby	AL	Katle	Britt
Stabenow	Mi	Matt	VanKulken
Strange	AL	Kevin	Tumer
Sullivan	AK	Joe	Balash
Tester	MT	Aaron	Murphy
Thune	SD	Ryan	Nelson
Tillis	NC	Jordan	Shaw
Toomey	PA	Dan	Brandt
Udall	NM	Bianca	Ortiz Werthelm
Van Hollen	MD	Karen	Robb
Warner	VA	Mike	Harney
Warren	MA	Dan	Geldon
Whitehouse	RJ	\$am	Goodstein
Wicker	MS	Michelle	Richardson
Wyden	OR	Jeff	Michels
Young	IN	John	Connell

THE PEW CHARITABLE TRUSTS



Bipartisan Senate Chiefs of Staff Retreat

The Pew Charitable Trusts

Invites You and Your Spouse To the 6th Biennial

Senate Chiefs of Staff Management and Leadership Retreat

Richmond, Virginia September 15-17, 2017

The Pew Charitable Trusts will host a retreat for the Senate Chiefs of Staff from September 15-17, 2017, in Richmond, Virginia. It promises to be an engaging weekend where you can learn from some of the most interesting speakers on management, leadership, and civility today. A copy of the draft agenda is <a href="https://dx.new.org/ntmarked-new-chiefs-new-chief-new-chi

We will depart Union Station on Friday, September 15, at 2:30 p.m., on a reserved Amtrak car and return via bus on Sunday, September 17, arriving back at the Capitol at approximately 2:15 p.m. Chiefs' expenses (minus alcohol and entertainment) are covered by The Pew Charitable Trusts. If you wish to invite your spouse, you may reimburse Pew for those expenses (estimated at around \$250).

Please <u>click here</u> to register, and we look forward to seeing you in historic Richmond this fall!

Tamera Luzzatto
Senior Vice President, Government Relations
The Pew Charitable Trusts
tluzzatto@pewtrusts.org
(202) 540-6501

The Pew Charitable Trusts makes every effort to comply with federal, state, and local government ethics rules, including when hosting events. Please make sure that your participation is consistent with applicable ethics rules.

The Pew Charitable Trusts
901 E St. NW, Washington, DC 20004
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